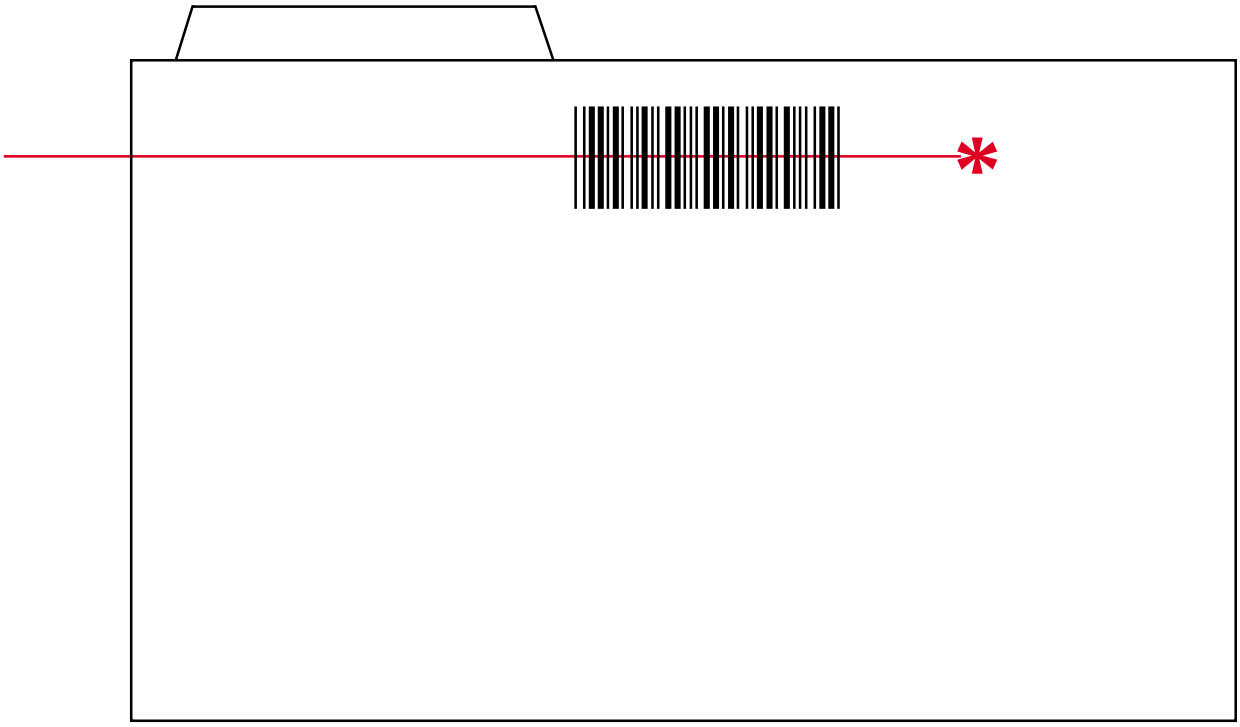
MEC Software

FileTracker



User Manual

Version 1.0

FileTracker
User Manual
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Introduction

In a perfect world, the folder you need is always in the file room exactly where it should be. Since this is not a perfect world, it is not uncommon to find that the file is out, being used by someone else. The trick, then, is to locate the folder as efficiently as possible.

FileTracker can save time and money by instantly displaying the name of the person who has checked out a file. Check-out and Check-in are quick and efficient; barcode tracking labels virtually eliminate file identification errors. FileTracker is simple and basic and very easy to use. This manual should provide you with all the information you need to use the program effectively.

Installation

Install the program
Run the installation program SetupFileTracker.exe, located on the CD-ROM (or downloaded via the internet). This program will automatically extract all of the files and install FileTracker.

Move the database file
Information about all of your files will be kept in a single database file named FileTrackerData.mdb. By default, this file is installed in the "C:\Program Files\FileTracker" folder on the computer where you installed FileTracker. It is often a very good idea to move this file to a shared network computer that is backed up regularly, perhaps a server. If you have purchased licenses for multiple workstations, they will all share the same data file.

Install the barcode font
The FileTracker package includes a TrueType font for printing barcodes on the tracking labels. Click on Start --> Settings --> Control Panel --> Fonts to display your font folder. Click on File --> Install New Font and browse to find "C:\Program Files\FileTracker\C39_60HN.TTF". Highlight this file and click Open to install the font. If you are using a demonstration version of the program, the font file is a demonstration font named C39_60HD.TTF (same typeface but selection of characters limited to 0-4 and A-E).

Start FileTracker and enter the installation key
Run FileTracker by clicking on Start --> Programs --> MEC Software --> FileTracker. The first time you run FileTracker, a pop-up window will ask you for the installation key. You have 3 options:

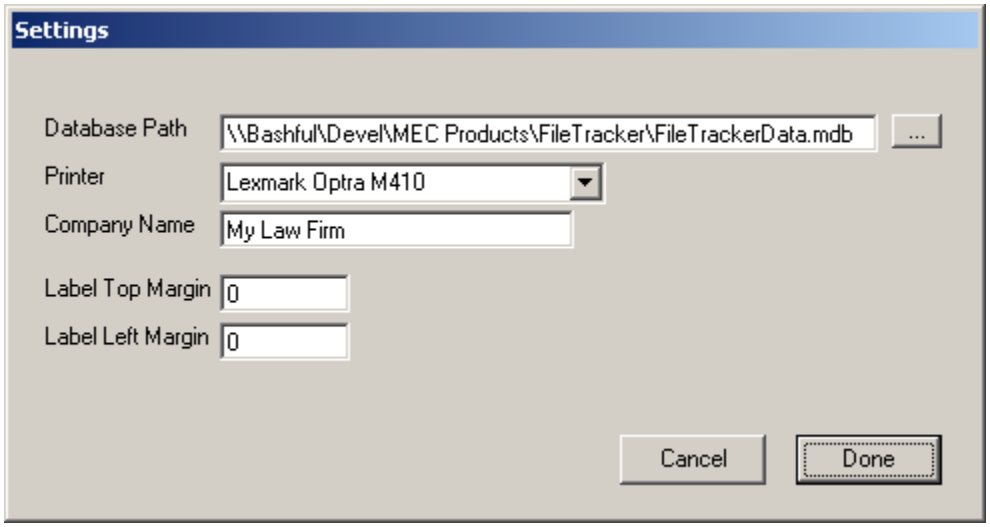
- Enter the installation key printed on the label affixed to your CD-ROM. This will install FileTracker as a fully functional program.
- If you downloaded the program from the internet and do not have an installation key, you can try out FileTracker by clicking Install as Demonstration. FileTracker will operate normally, but will limit you to 25 file records.
- If you click Cancel, FileTracker will run in demonstration mode. The pop-up window will ask for the installation key each time you start the program.

To unlock a demonstration version of FileTracker you will need an unlock key. From the Main Menu, click on About to display information about the program; a numeric installation code will appear directly below the program's version number. Provide this number to MEC Software or an authorized distributor and you will be given a numeric code and instructions for unlocking.

Connect a Barcode Scanner
See Appendix A for information about connecting and using a barcode scanener.

Configure FileTracker

Click Settings to display the configuration screen. You will need to provide the supervisor password ("SUPV").



Enter the complete pathname to the FileTrackerData.mdb file in the Database Path field. You can click the button to the right of the field to display a browser window.

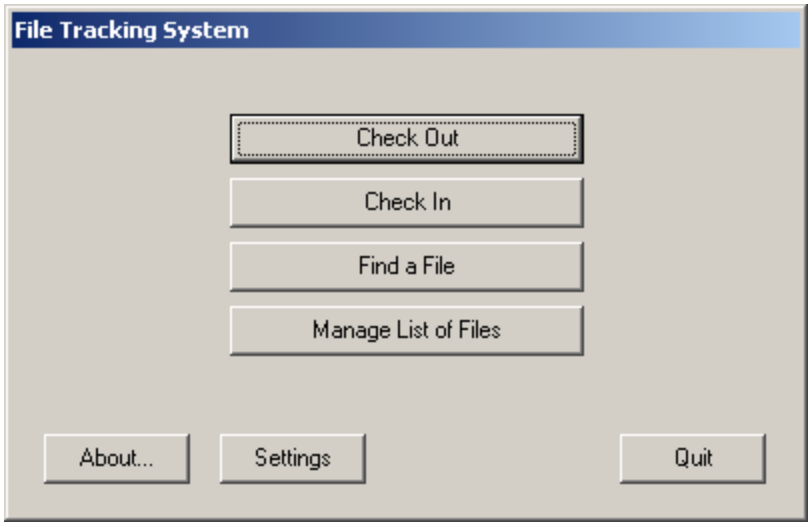
Select the printer that will be used to print the barcode tracking labels. This can be any laser (preferred) or inkjet printer. Blank tracking labels can be purchased at any office supply store; the format is 30 labels per letter-size sheet, 3 columns and 10 rows.

The information you enter in the Company Name field will be printed at the top of each tracking label.

Set the Label Top Margin and Label Left Margin in decimal inches. For example, 0.25 for a quarter inch. This make take a bit of experimentation to get the settings just right for your particular printer.

When you are finished, click Done to save the settings and return to the Main Menu.

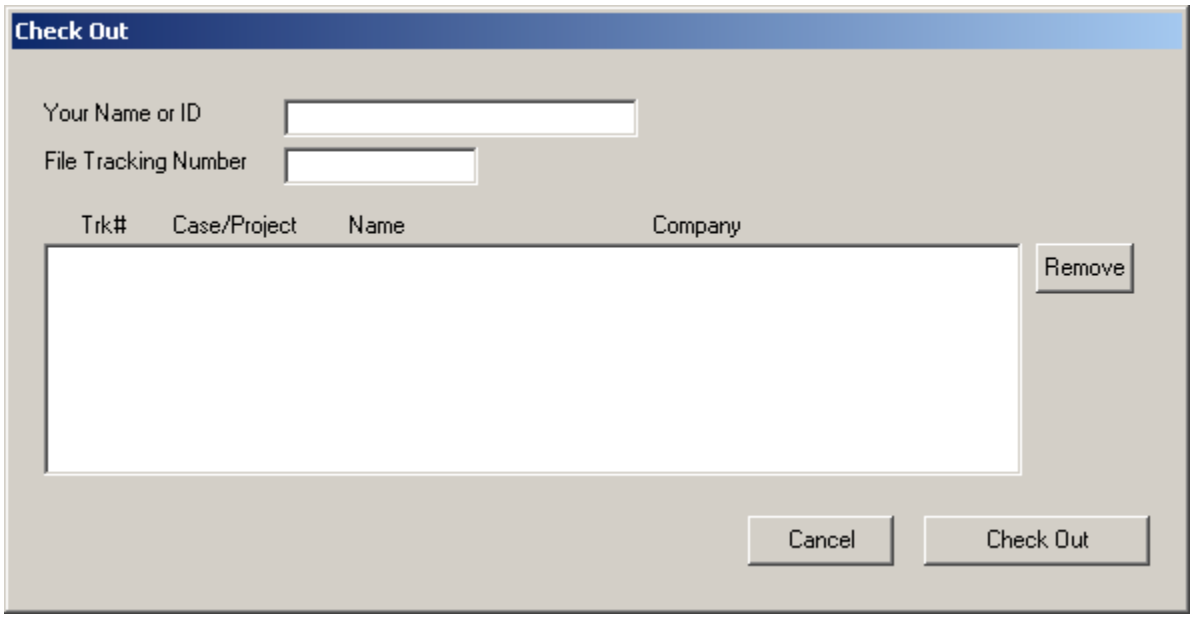
Main Menu



The Main Menu provides access to all of FileTracker's functions:

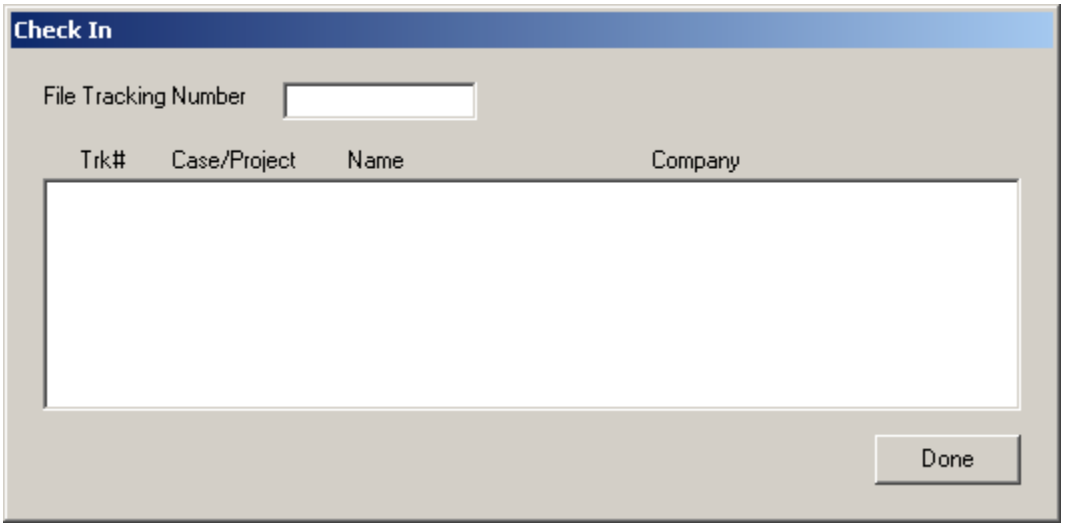
Check Out:	Remove a file from storage.
Check In:	Return a file to storage
Find a File:	Look up the current status of a file
Manage List of Files:	Supervisory functions to manage the files in the system
About:	Display information about FileTracker
Settings:	Configure FileTracker
Quit:	Quit the program

Check Out



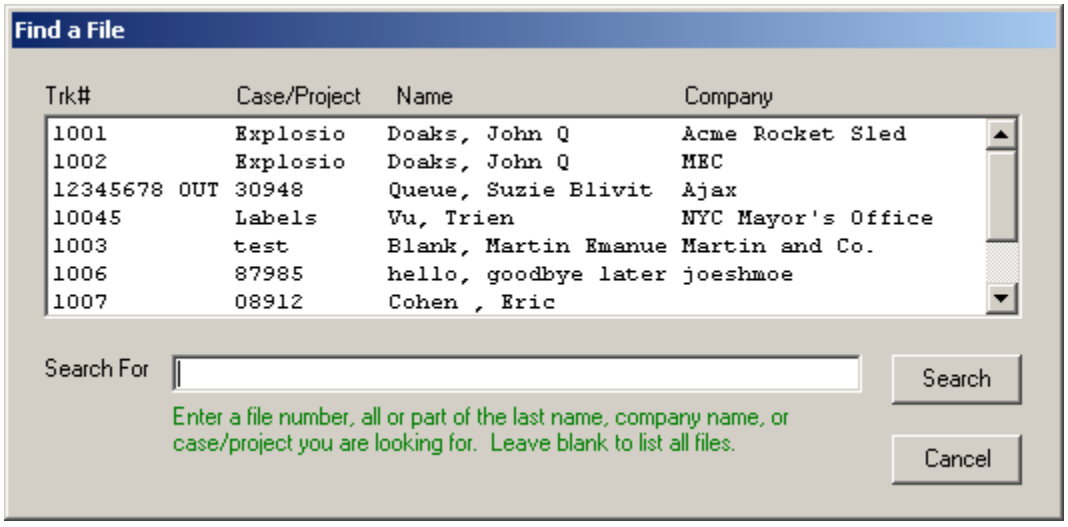
Scan or enter the identification of the person taking the folder, and then scan the tracking barcode for each folder. As each folder is scanned, it will appear on the list. When all of the folders have been scanned, click Check Out.

Check In



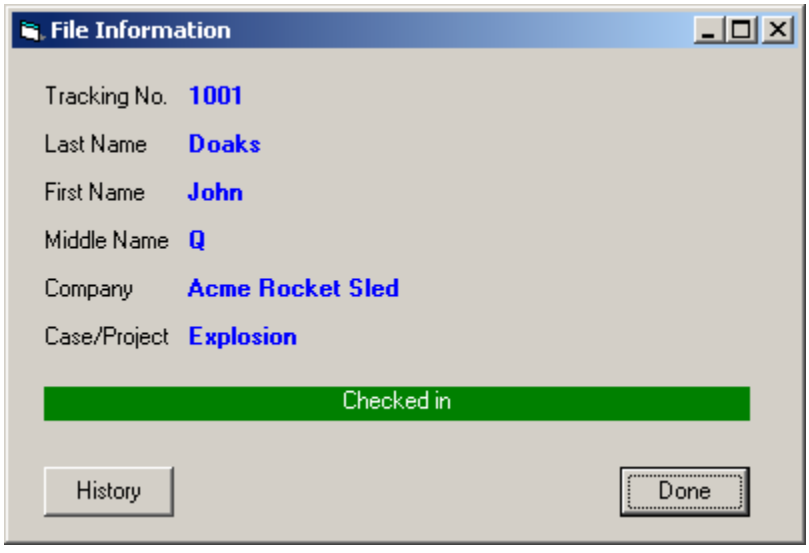
To check folders back in, scan the tracking barcode for each folder.. When all the folders have been scanned, click Done.

Find a File

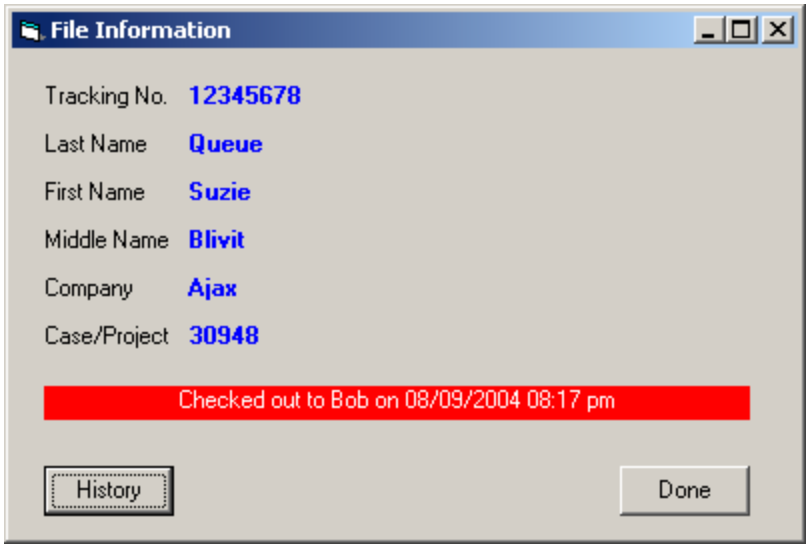

Find a File
Trk#
Case/Project
Name
Company
1001 Explosio Doaks, John Q Acme Rocket Sled
1002 Explosio Doaks, John Q MEC
12345678 OUT 30948 Queue, Suzie Blivit Ajax
10045 Labels Vu, Trien NYC Mayor's Office
1003 test Blank, Martin Emanue Martin and Co.
1006 87985 hello, goodbye later joeshmoe
1007 08912 Cohen , Eric
Search For
Search
Enter a file number, all or part of the last name, company name, or case/project you are looking for. Leave blank to list all files.
Cancel

To display information about a file, scroll down the list and double-click on a list entry. You can limit the list to a few files by entering what you are looking for in the Search For field. For example, entering “AR” will pare the list down to files with tracking numbers, case/project codes, names, or companies beginning with “AR”. To display all items in the database, leave Search For blank and click Search. Note that if a file is currently checked out, the word “OUT” appears in the second column of the list.

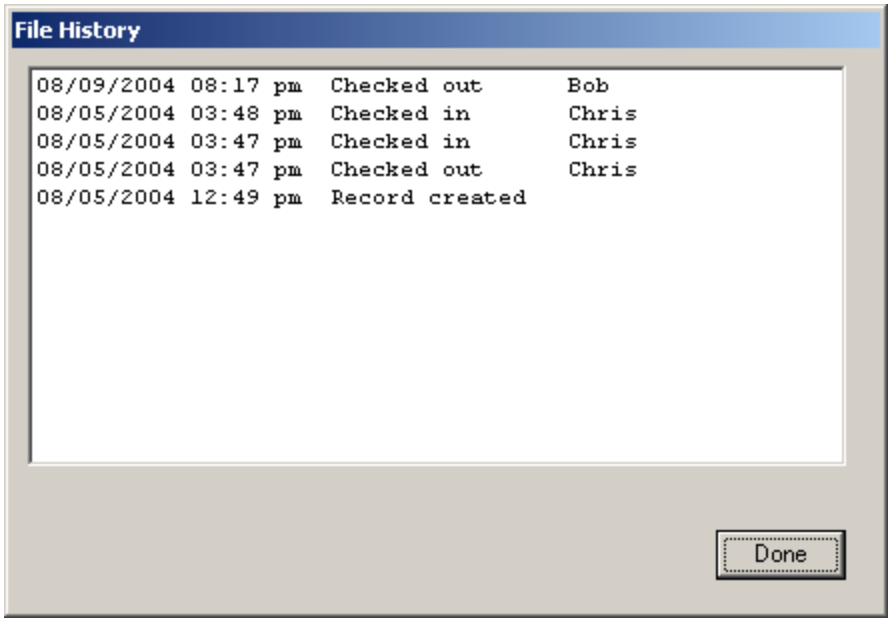
Double-clicking on a file displays information, including whether the file is checked in or out. If the file is checked in, that is indicated by a green band with the words “Checked In”.



A red band indicates that the file is checked out, and includes the name of the person and the date and time at which the file was checked out.

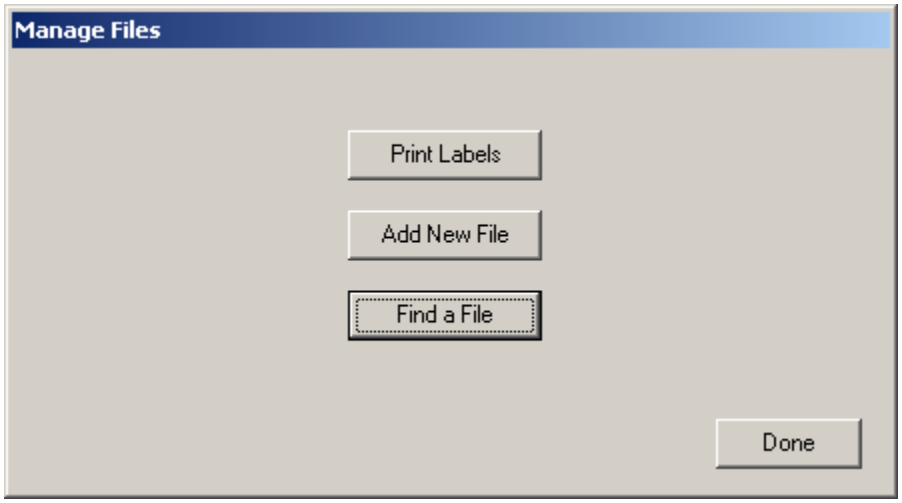


If a file proves difficult to track down, clicking the History button will display information about the file's travels in reverse chronological order. This information may help locate a file.


File History
08/09/2004 08:17 pm Checked out Bob
08/05/2004 03:48 pm Checked in Chris
08/05/2004 03:47 pm Checked in Chris
08/05/2004 03:47 pm Checked out Chris
08/05/2004 12:49 pm Record created
Done

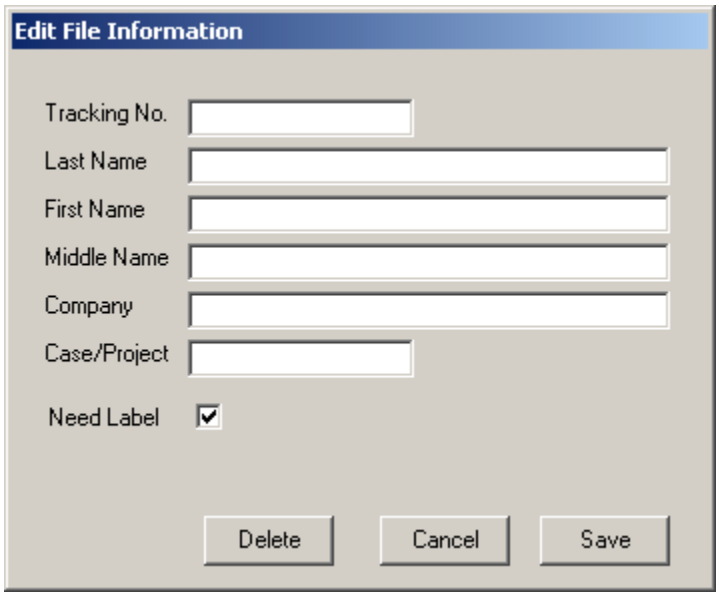
Manage List of Files

You will be prompted for the supervisory password (“SUPV”), and the Manage Files menu will appear. From here, you can print file tracking labels, add new files to the database, or find an existing file.



Add a new file
Use this function to add new folders to the database. Fill in the Edit File Information screen with details about the new file. Be sure to fill in the Tracking No. field with a unique identifier (FileTracker will remind you if you forget to fill this in or if the number is already in use).

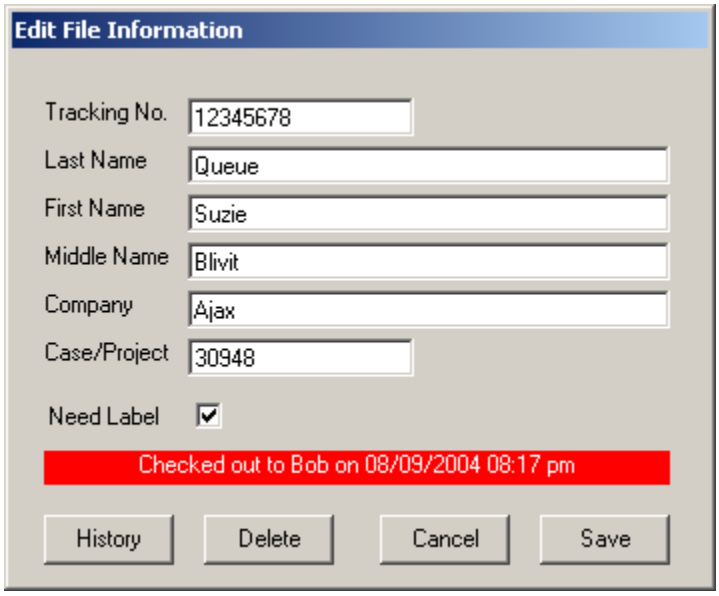
Note: The current version of FileTracker does not assign Tracking Numbers automatically. This is because the majority of users want to enter numbers that are used in their existing manual systems. Options for automatic tracking numbers will be included in a future release of FileTracker.



Need File is automatically checked when a new record is created. The next time tracking labels are printed, this file will be included. When the form is filled in, click Done to save the record.

Display and edit information about an existing file

Click Find a File to display the search screen; this is the same screen that is available from the Main Menu, discussed earlier in the manual. The difference is that when a file is selected for viewing here, you can edit the information. The one piece of information you cannot change is the Tracking Number. Once assigned, a tracking number is permanent; the only way to change the tracking number is to delete the record and then re-enter the information as a new record.



Check Need Label if you would like a new tracking label the next time labels are printed. The box is automatically checked for new records, and is automatically un-checked when labels are printed.

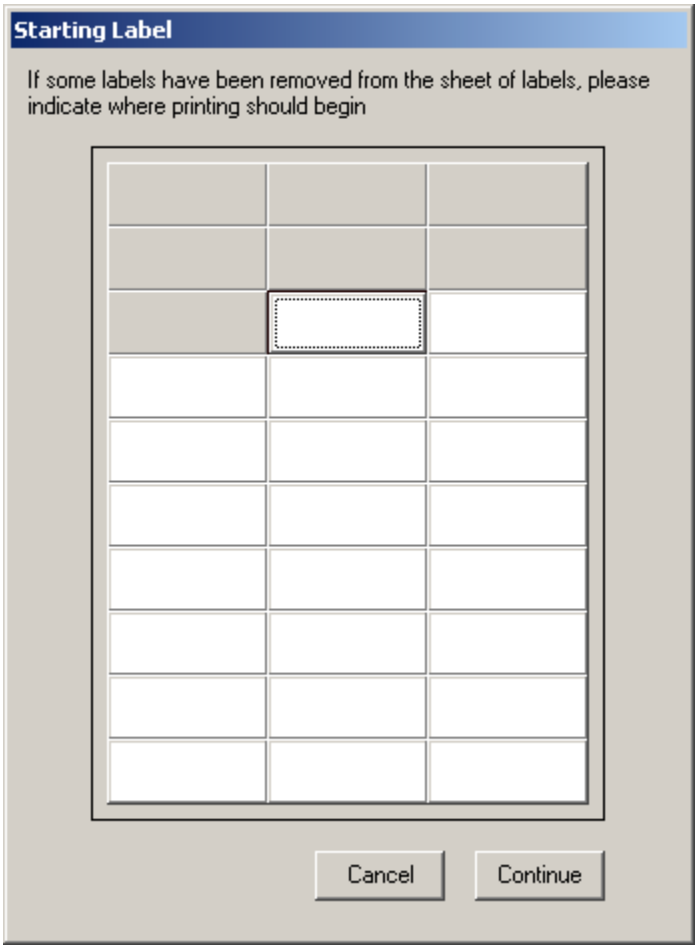
The delete button will remove the file's record from the database (use this with caution; you will be prompted to confirm that you really want to delete the record).

Printing Labels

A barcode tracking label is affixed to each file folder. Each label includes the name of the company (entered on the configuration screen), the name assigned to the folder, and the folder's tracking number barcode. The barcode is the folder's "license plate" that uniquely identifies it.

To print tracking labels, click on Print Labels. The labels will be printed on sheets of 30 labels each (3 columns, 10 rows). You may have available a partially-used sheet with some missing labels, and

the screen that appears next lets you tell FileTracker where to start printing. Click on the first label where printing should start. In this example, the first 7 labels have already been removed from the sheet; we have clicked on the label in row 3, column 2, and that is where printing will begin.


Starting Label
If some labels have been removed from the sheet of labels, please indicate where printing should begin
Cancel
Continue

Insert enough sheets of labels into the printer and click Continue. The labels will be sent to the printer and a message “Did the labels print successfully?” will appear. If the labels printed properly, click Yes, and Need Label will be automatically unchecked for all files. If you answer No, the Need Label check boxes will be left alone and you can reprint the labels.

Appendix A - Barcode Scanners

Barcode scanners are available with a wide variety of features. FileTracker will work with most types of scanners; here are the basic requirements:

Able to read Code 39 barcodes (also known as Code 3 of 9)
Practically every scanner manufactured anywhere in the world can read this type of barcode.

Keyboard Wedge interface
The scanner sends the barcode data to the computer's keyboard buffer. When you scan a barcode, it looks exactly as though you had typed the information by hand; the barcode data will appear on the screen wherever the keyboard cursor is located.

Keyboard wedge interfaces are generally of two basic types: One uses a Y-shaped cable to physically plug the scanner in between the keyboard and the computer. A USB keyboard wedge interface plugs into a USB port on the computer; insertion of the barcode data into the keyboard's buffer is done automatically in software. FileTracker does not care which of these two types of interface is used. You can test a keyboard wedge scanner by displaying Notepad or a word processor program and then scanning a barcode. The data from the barcode should appear on the screen.

Scanning Technology
Scanners are available to read barcodes using a variety of methods. FileTracker does not care what type of scanner is used; the choice has more to do with operator convenience. The one type of scanner that we do not recommend is a wand that physically contacts the face of the label. The file tracking labels will be read multiple times over their life span; dragging a scanning wand across the face of the label will eventually degrade the barcode image and require printing a new label.

Linear CCD Scanners: Inexpensive and practical. Typically short range (up to a few inches) but this is really not an issue for scanning file folders.

Linear Laser Scanners: A bit more expensive; quick, with a longer range than CCD (up to roughly 8 to 10 inches).

Raster Laser Scanners: Project a cross-hatch of laser beams, like the typical grocery store scanner. Very nice for hands-off scanning, but probably not worth the extra cost for reading file folders.

2D Scanners and Imagers: Capable of reading 2-dimensional barcodes. Not needed for FileTracker. If 2D capability is needed for other reasons, FileTracker is perfectly happy to work with this type of scanner provided it has a keyboard wedge interface.